Learning Administration Introduction

Access, navigate, and search for information within SuccessFactors Learning.

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Learning Administration Introduction: Personalize Your Admin Experience

SuccessFactors Learning Administration Home page is configurable, allowing you to choose the layout of the page, enter Welcome information, and add Quick Links to the tasks you complete most frequently.

Admin Tools > Learning > Learning Administration

1 Learning Administration

Learning Administration is where you add and edit learning related items, schedule training, enroll users into training events, give users credit for completing training, and run reports.

2 Home Page Layout

You can configure your own Learning Administration Home page by adjusting the layout of the Welcome and Quick Links areas. You can also adjust the size of each area using the slide bar between the two areas.

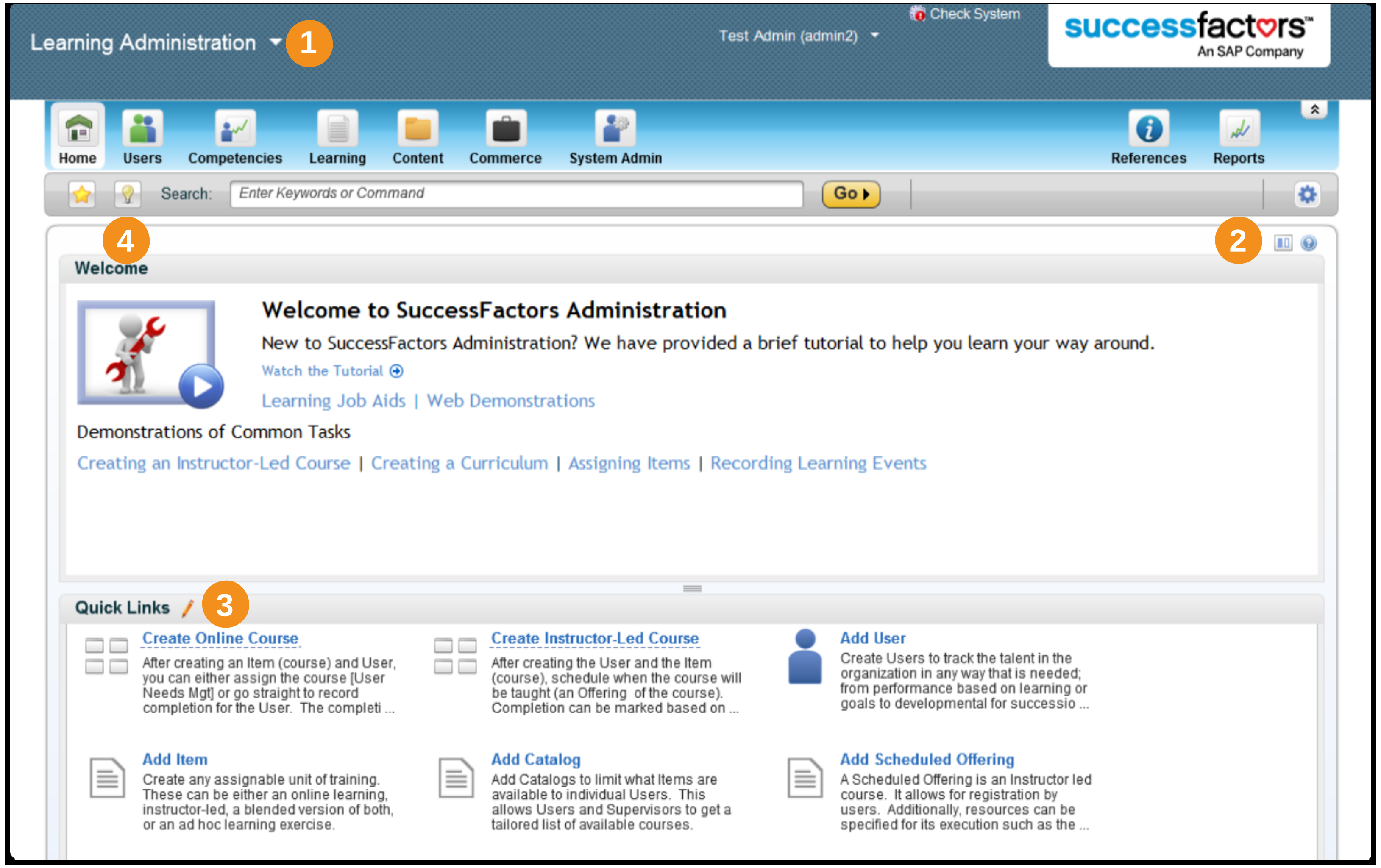
3 Quick Links from Home Page

Any command available from the Search text box can be added to your Quick Links, so you can easily complete the tasks you do most often. Quick Links can also be configured into groups that allow larger processes to be defined and accessed from one area.

Quick Links can be defined on a global level and then personalized by every administrator, always following any assigned security permissions. The definition for each selected command is label driven.

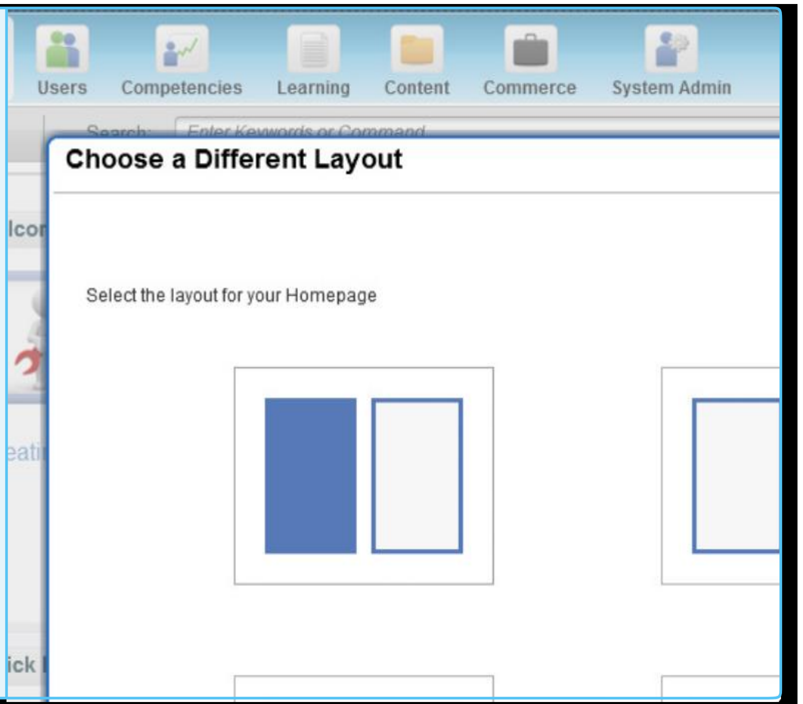
4 Guided Mode

Guided mode provides less experienced administrators with a guided process for completing routine, multi-step actions. Click the ***Guide Me*** icon on any group process to access that process from anywhere within the application.



Spotlight: Personalize Your Admin Experience

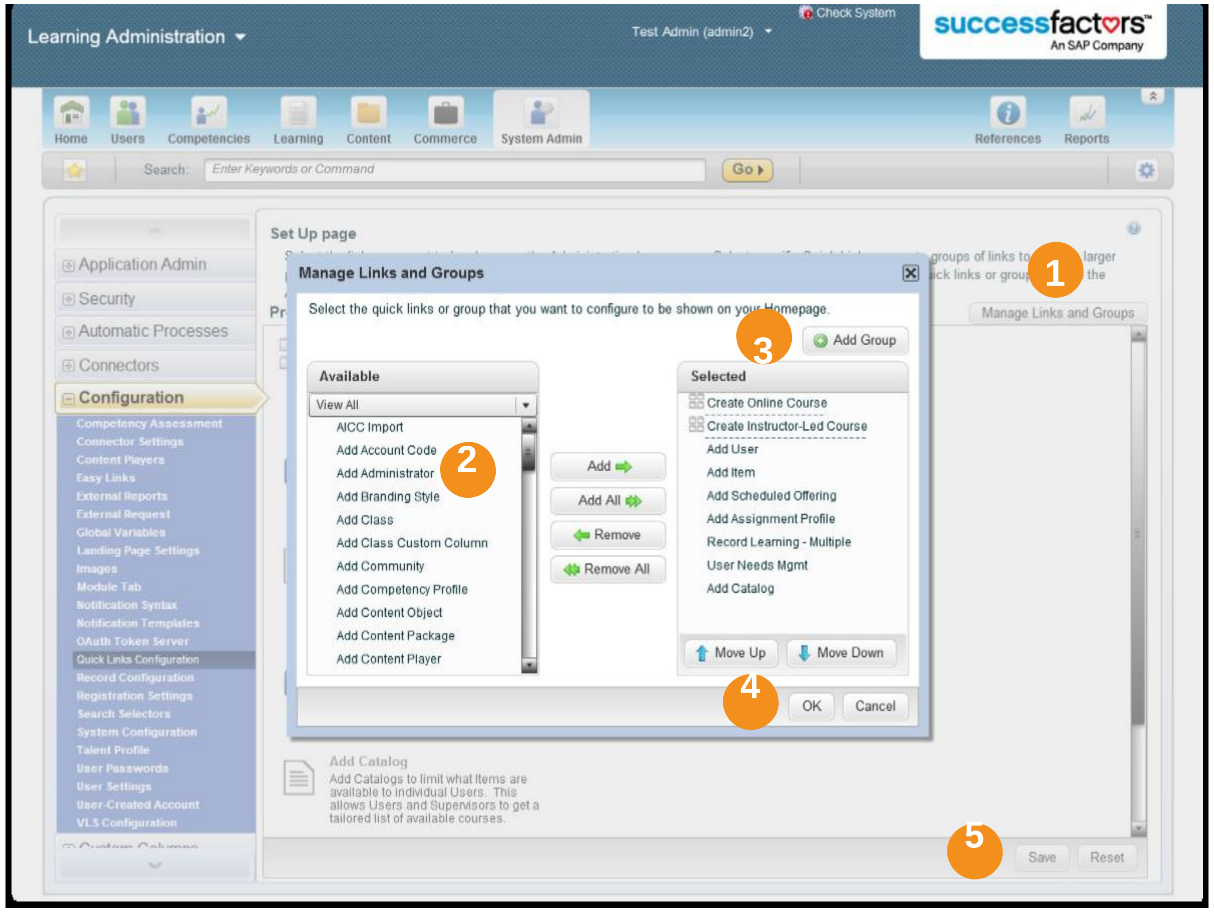
You can customize the Learning landing page for your users by adding custom, media rich tiles using the custom content tile tool and rich text editor. If you have experience in web design, you can switch to code view and enter custom HTML. You can also create custom content tiles for specific organizations.



Personalize Your Admin Experience: Step by Step

Configuring Quick Links and Home Page

Admin Tools > Learning > Learning Administration > System Admin > Configuration > Quick Links Configuration



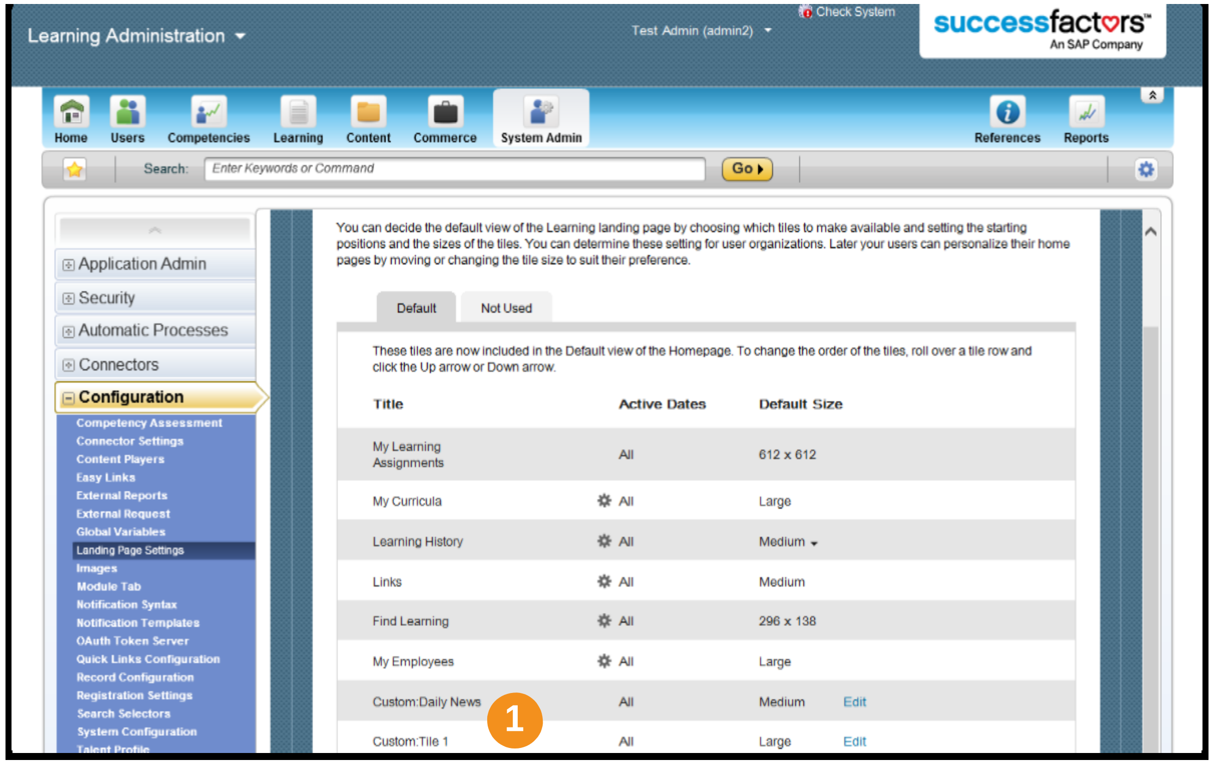
1. Select the ***Manage Links and Groups*** button.
2. Select the quick links you wish to add to the default ***Learning Administration Home page*** and click ***Add.***
3. Click ***Add Group*** to create a group of quick links which define a larger process or are related, which you want to show together.
4. When done, click ***OK.***
5. When done, click ***Save.***

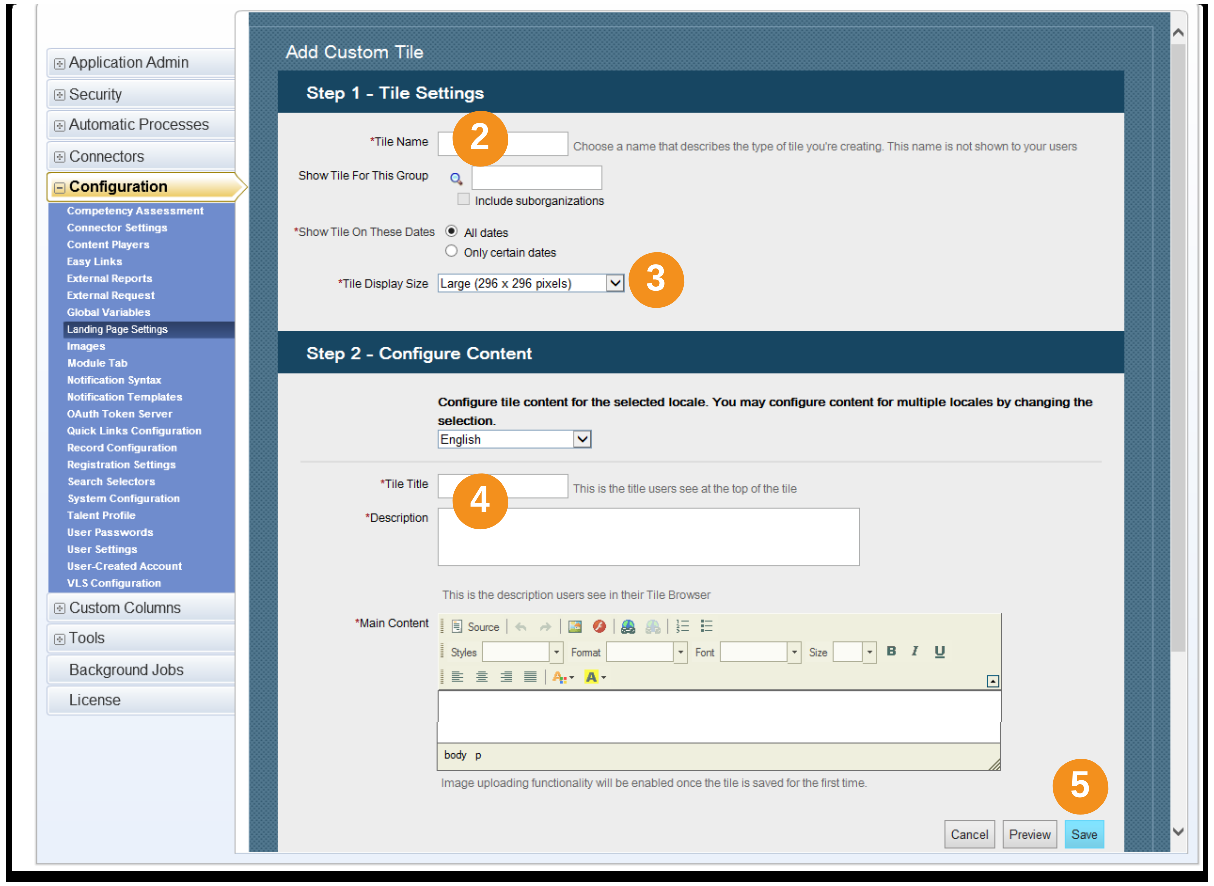
Personalize Your Admin Experience: Step by Step

Configuring Tiles

Admin Tools > Learning > Learning Administration > System Admin > Configuration > Landing Page Settings

1. Click the ***Add Custom Tile*** link.
2. In the ***Tile Settings*** section, enter a descriptive ***Tile Name*** for your own reference. This will not be shown to users.
3. Custom tiles can be created for a specific group and suborganization by specifying who the tile should be shown to. You can also select to show the tile all the time or only on certain dates. The ***Tile Display Size*** can be changed using the drop-down menu.
4. In the ***Configure Content*** section, enter the ***Tile Title*** that will be shown to users, a brief description.
5. Click ***Save.***





Learning Administration Introduction: Administrator Screen Layout

The Learning Administration page is organized into four main sections.

Admin Tools > Learning > Learning Administration

1 Top Menu Frame

The top menu frame contains tabs and buttons used to access the main functional areas in SuccessFactors Learning.

2 Keyword and Quick Command

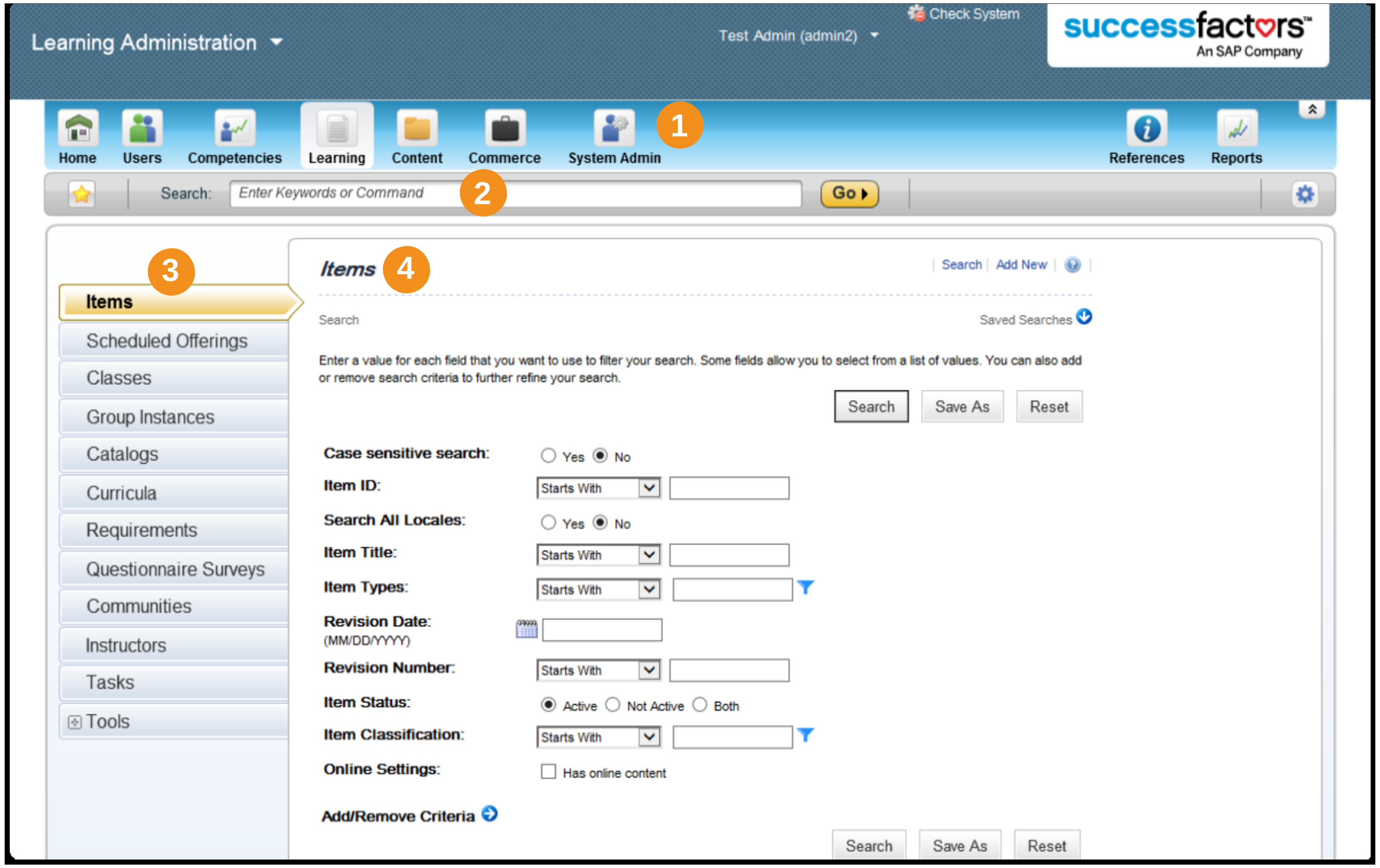
Use the Search textbox to perform a keyword or quick command search to locate a record based on the text that appears in one of the common fields for that record.

3 Left Menu Frame

Based on the button clicked in the top menu frame, a related set of menu options display in the left menu frame. If a menu item has subsections within it, a plus button is displayed which can be clicked to expand the menu.

4 Content Frame

When a left menu option is selected, the corresponding screen displays in the content fame. This is the working area where searches are conducted to retrieve, view, and edit records. There are two features on every page in the content frame: Breadcrumbs and Help.



Spotlight: Top Menu Frame

1. ***References*** allows you to manage the referenced fields that used throughout SuccessFactors Learning, including calendars and time, geography, and physical resources.
2. ***Reports*** is used to manage reports, including searching for and running reports.
3. ***Preferences*** is used to change your locale (language, date/time format, etc.) and time zone settings, reset your e-signature personal identification number (PIN), and reset your password and security question/answer.

Learning Administration Introduction: Layout of Learning Records

Admin Tools > Learning > Learning Administration

1 Bookmarks

The ***Bookmarks*** area in SuccessFactors Learning is to provide you with a method for organizing the database records and system entities that you need to access or modify most frequently. This allows you to skip the step of repeatedly searching for commonly accessed records.

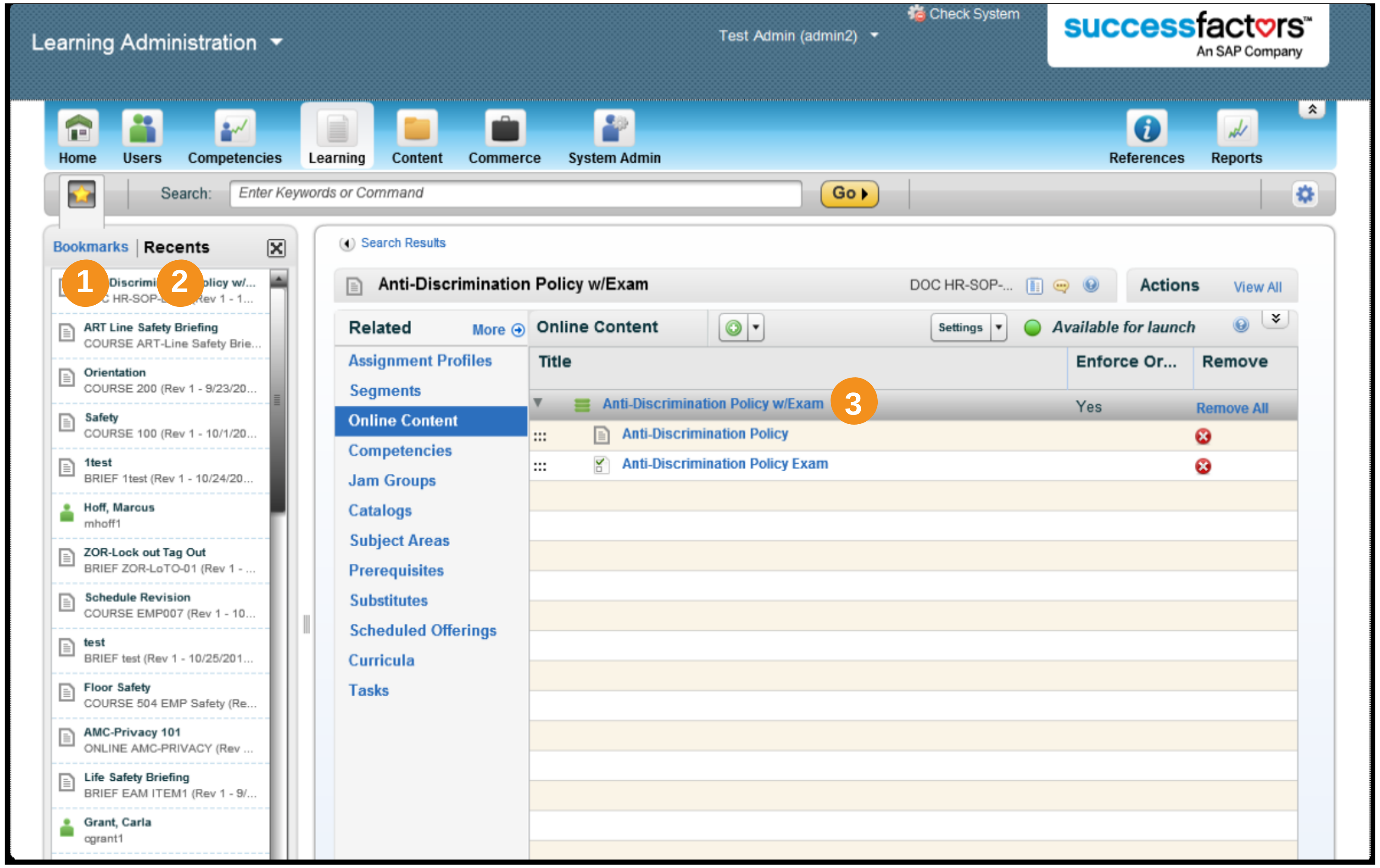
Bookmarks are accessible from any screen within the application. Entities can be bookmarked based on personal preference. As an administrator, you have the ability to bookmark Items, Curricula, Scheduled Offerings, User Records, Catalogs, and Assignment Profiles in SuccessFactors Learning.

2 Recently Accessed Records

The ***Recents*** panel displays the records that you have accessed most recently at the top of the list. Finding records that were recently accessed allows you to return to previously viewed records much faster. Recently accessed records are available from anywhere and the feature tracks enough data so your activity in recent sessions is just a click or two away.

3 Cross Entity Linking

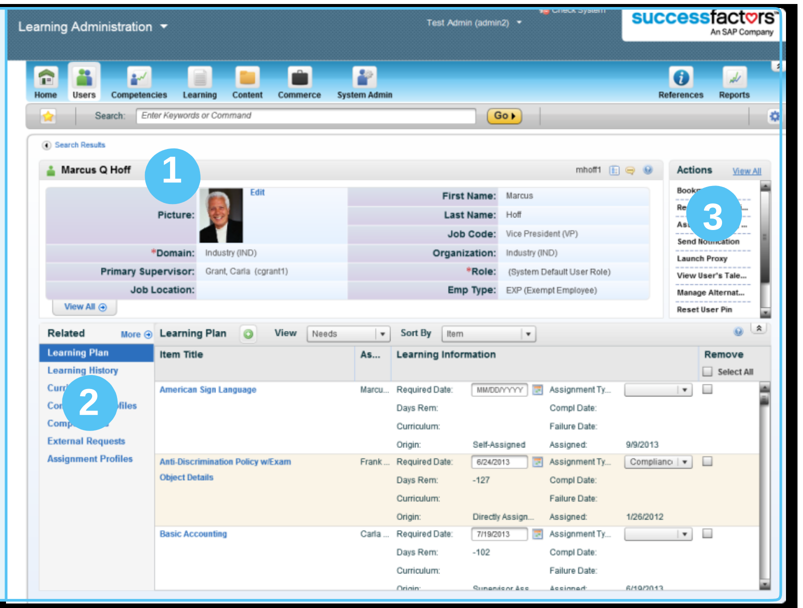
When accessing records, users frequently see related associations that they may like to investigate more fully. ***Cross entity linking*** makes each association a hyperlink that takes the user to the record in question. This helps to reduce the time spent searching for information.



Spotlight: Layout of Learning Records

The screen layout of some Learning records contains three main areas:

1. The ***Core*** area (also called the Summary Tab) displays summary information about the record.
2. The ***Related*** area contains additional information regarding the entity record.
3. The ***Actions*** area includes links for you to take additional actions on the record.



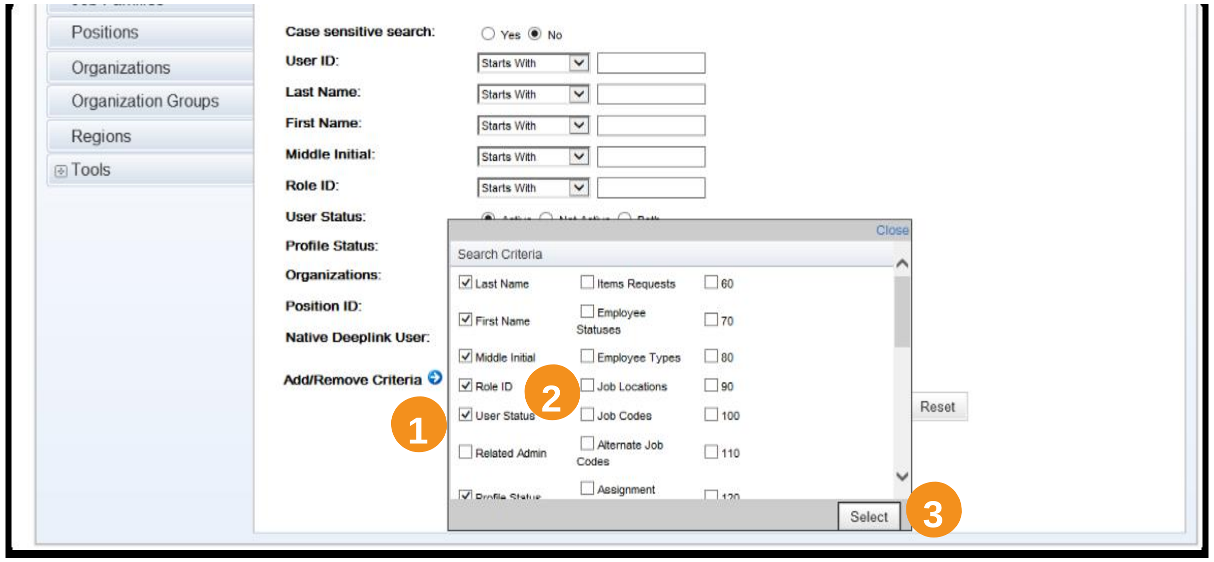
How to Search: Step by Step

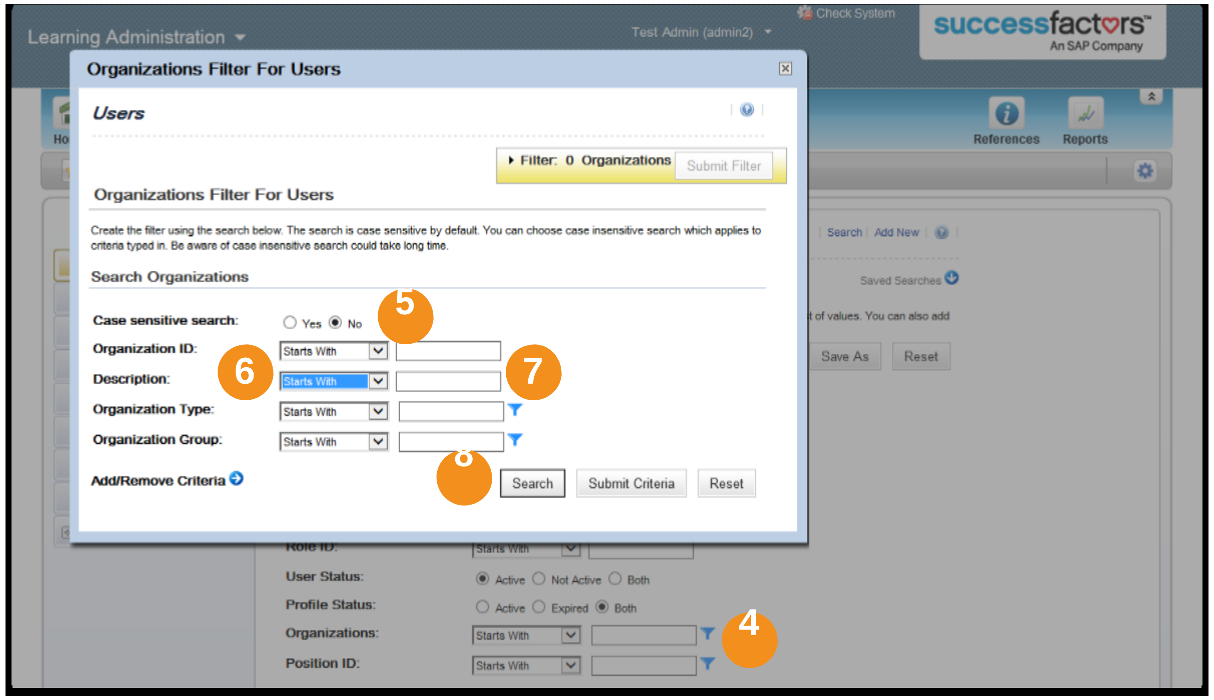
Adding/Removing Search Filters

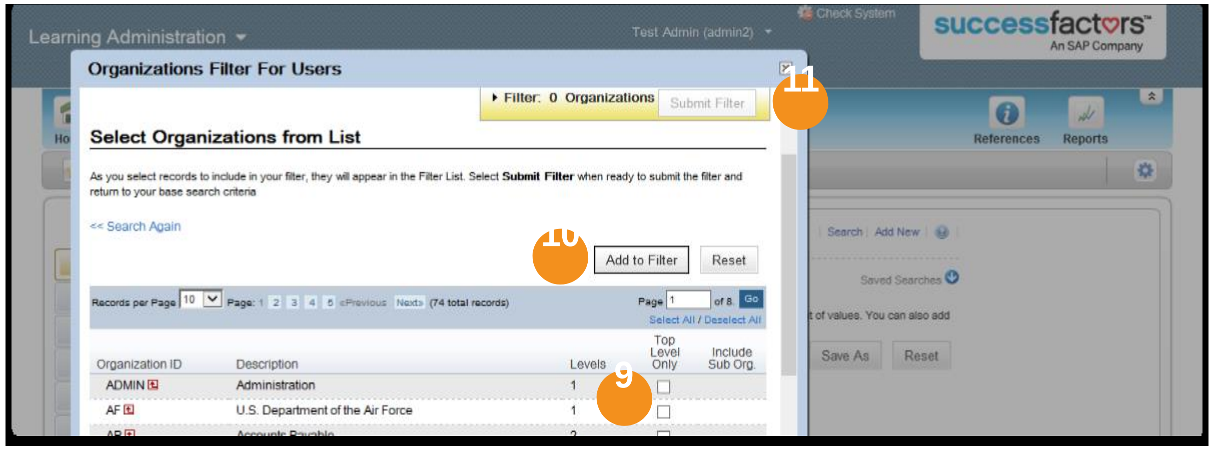
SuccessFactors gives you many search criteria filters to determine the attributes of the entity that you would like to use for your search. The search filter determines the contents of your results by listing only entities that satisfy all the criteria specified by your filter. Searching by various attributes of specific criteria is helpful when the exact ID is not known.

Admin Tools > Learning > Learning Administration > Users

1. You can add and remove criteria on your organization's search screen by clicking the ***Add/Remove Criteria*** link.
2. Select the checkbox for the criterion you wish to add.
3. Click ***Select***.
4. The search query now displays on the Users search screen. To create the filter on the criteria, click the ***Filter by criteria*** icon.
5. You can choose whether or not you want your search to be case sensitive by setting the ***Case Sensitive Search*** option. To do a non-case-sensitive search, select ***No*** (if that is not the default setting).
6. Use the drop-down menu to select
7. Enter the information you know in the text field.
8. Click ***Search***.
9. Click the checkboxes to select your choices from the search results.
10. Click ***Add to Filter***.
11. Click ***Submit Filter***.







How to Search: Step by Step

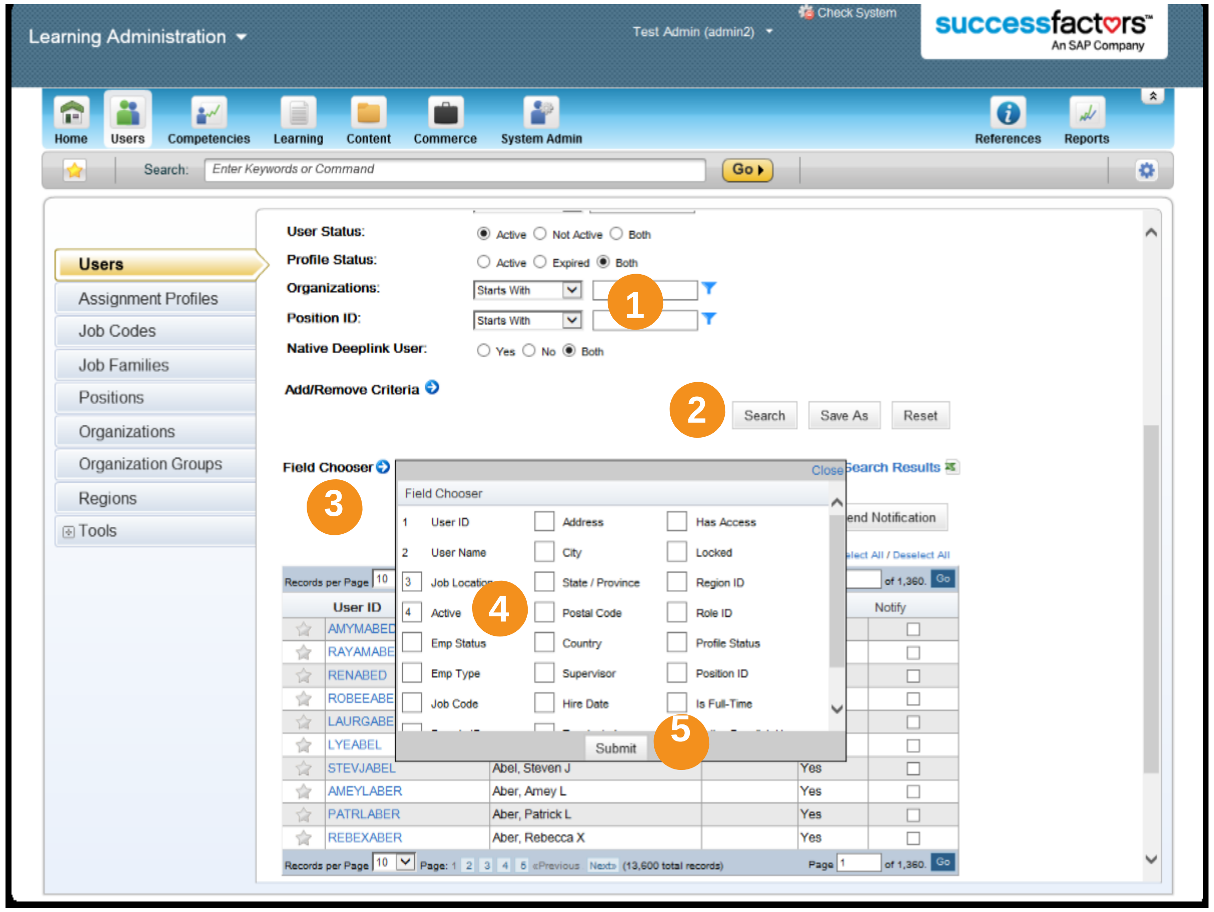
Adjusting Display of Your Search Results

Once you have the results you are looking for, you can sort the data based on the key columns on your list (except the Description and Employee Status column/field).

To sort the list by an entity, click the header of the column to be sorted. An arrowhead will display indicating how the column is sorted, either in ascending or descending order.

Admin Tools > Learning > Learning Administration > Users

1	Enter your search criteria.
2	Click ***Search***.
3	In the search results section, click the ***Field Chooser*** link.
4	In the ***Field Chooser*** pop-up window, you get to select which attributes of the listed entities to display in the search results, and in which column. The first column (number 1) always displays the record's ID and is non-editable. For some entities, the second column is non-editable as well. You can add and/or remove other columns. Select the attributes you want to display. In the text box on the left of each item, enter the number of the column in which you want the data to appear.
5	Click ***Submit*** to see your search results.

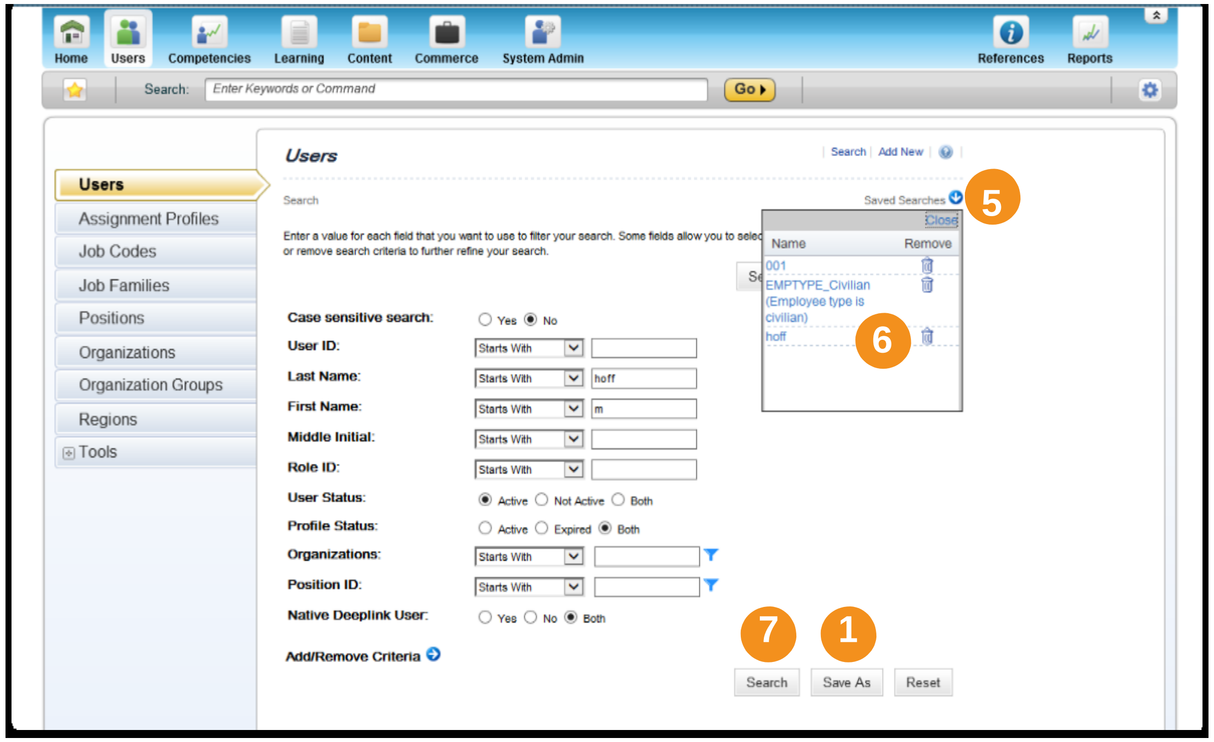


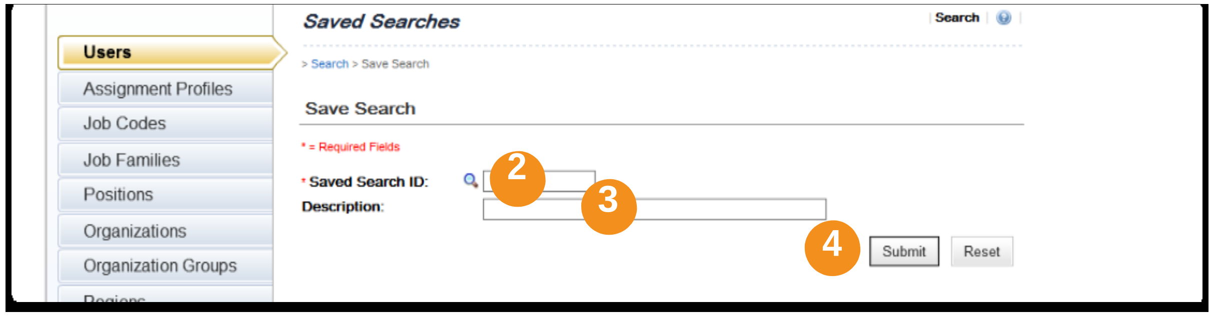
How to Search: Step by Step

Saving Your Individual Search

Admin Tools > Learning > Learning Administration > Users

1. Enter your search criteria using the drop-down menus, text fields, and buttons. When done, click ***Save As***.
2. Enter an ID for your saved search.
3. Enter a brief description of the search to make referencing it in the future easier. Please note, the search filter is individual-based and available only to you.
4. Click ***Submit***.
5. To access your saved searches: click ***Saved Searches***.
6. Click a link to select the search you wish to conduct.
7. Click ***Search*** to run the search using the saved filters.





Downloading Your Search Results

8. On the search results page, click ***Download Search Results***.
9. Select whether to ***Open*** or ***Save*** the file in the dialog box.